Illinois
Lobbyists
Electronic Expenditure Filing Instructions

Jesse White
Secretary of State
State of Illinois
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INTRODUCTION

Lobbyist expenditure reporting for 2012 does not require any new mandates for information to be submitted. There are, however, edits to clarify some procedures, and we have added a method to enter multiple officials who received the same expenditure to provide a quicker, less duplicative reporting process.

This Guide provides information about these changes and how to prepare reports in the most efficient manner in order to maintain compliance with the Lobbyist Registration Act. Included are copies of the web site screens that will be used to perform all the data entry requirements. The review of this guide prior to entering the reporting system should help you to prepare for filing and reduce questions that may arise during filing.

A registrant’s Authorized Agent must file an expenditure report even when no reportable expenditures were incurred during the reporting period. The report should contain the reportable expenditures of all the entity’s lobbyists. Lobbyists registered exclusively under an entity are not required to submit their own report.
EXPENDITURE INFORMATION

Entity Responsible For Reporting

The reporting of expenditures is determined by who actually made a reportable expenditure. Specifically:

- If an expenditure is made by a registered entity or by that entity’s exclusive lobbyist, the expenditure is reported by the registered entity.
- If an expenditure is made by a contractual lobbying entity and a client did not reimburse the contractual lobbying entity, the contractual lobbying entity reports the expenditure.
- If an expenditure is made by a contractual lobbying entity and a client reimbursed the contractual lobbying entity during the reporting period, the client reports the expenditure.

Non-reportable Expenditures

Examples of non-reportable expenditures include the following:

- Campaign contributions;
- Lobbyist’s personal expenses;
- Office, clerical or support staff expenses;
- Salary, fees and other compensation paid to registrant for lobbying; and
- Expenditures made on behalf of an official that are returned or reimbursed prior to the filing deadline for submission of the report.

Reporting Schedules

Expenditure reporting is performed by using the different types of schedules and reports listed below:

- **Itemized Schedule** - Use this schedule to report any single, individual expenditure made on behalf of an “Official.”
- **Large Gatherings Schedule** - Use this schedule to report expenditures incurred when hosting a reception or benefit to which 25 or more “Officials” are invited.
- **Giveaways Schedule** - Use this schedule to report expenditures incurred for generic gifts, product samples or substantially identical items given to 25 or more “Officials.”
- **Grass Roots Lobbying Statement** - Use this statement to report an expenditure made by an individual who participates in a Grass Roots communication and makes an expenditure on an “Official” during a Grass Roots communication or event sponsored by the registered entity. *These statements allow member organizations or individual members to make and report expenditure(s) through the registered umbrella organization without having to register themselves as lobbyists.*
- **Expenditure Summary Report** - This report summarizes the amounts of all reported expenditures by category. The report is automatically generated as a result of the expenditures entered into the system through the above-mentioned schedules.
Report Deadlines/Late Fees

Expenditure Reports for 2012 are required as follows:

- Expenditure reporting is semi-monthly.
- All reports must be filed by 11:59 p.m. on the day of the filing deadline. There is no extension of a filing deadline when holidays or weekends are part of the filing period.
- Entities that fail to file expenditure/activity reports by the required deadlines are subject to a $50 late fee. Filings submitted more than 15 days after the deadline also will be charged a $100 penalty fee when submitting the report.

### 2012 Expenditure Reporting Calendar

<table>
<thead>
<tr>
<th>Reporting Period:</th>
<th>Filing Period Opens:</th>
<th>Filing Deadline (11:59 p.m.):</th>
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<tbody>
<tr>
<td>January 1 – 15</td>
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<td>January 5, 2013</td>
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Officials Required to Report

The electronic expenditure reporting system provides a reporting mechanism only for Officials or Official Titles, which are listed on pages 27 and 28. If expenditures were made on behalf of other individuals, they are not required in an expenditure report.

Notification to an Official

The law requires that lobbyists who make an expenditure on behalf of an official must inform the official in writing contemporaneously with the official's receipt of the expenditure, that the expenditure is a reportable expenditure and that the official will be included in the report submitted to the Secretary of State.

Within 30 days after a filing deadline, each official shall be notified again that an expenditure made on his or her behalf has been reported. No specific notification form is required; however, the notification should include the name of the lobbying entity, the total amount of the expenditure, the date on which the expenditure occurred, a description of the expenditure, location of the expenditure, and the subject matter of the lobbying activity.

NOTE: THESE NOTIFICATIONS MUST BE FILED ONLY WITH THE OFFICIAL AND NOT WITH THE SECRETARY OF STATE.

Lobbyist Responsibilities When Terminating Employment

Should a lobbyist terminate employment from a registered lobbying entity for which he or she is an exclusive lobbyist, a letter containing the following information must be filed with the Secretary of State Index Department within 30 days of termination:

- A statement that the lobbyist is or has terminated employment with a registered entity, including date of registration and date of termination.
- Forwarding contact information, including new e-mail address.
- A report of expenditures incurred by the lobbyist since the last expenditure report was made by the entity. If no expenditures were incurred, indicate such.
- Include a statement under his/her signature that “This letter of termination is submitted under oath and subject to penalties within the Lobbyist Registration Act, and pursuant to Section 1-109 of the Code of Civil Procedure.”
- Indicate that a copy of the letter has been provided to the authorized agent of his/her employer/entity.

In addition to the information that is to be included in the letter, a final affirmation must be submitted online attesting to the accuracy of expenditure reports filed during any portion of the semi-annual period that the lobbyist was registered.
Affirmations

Lobbyists are required to file an online affirmation attesting to the accuracy of any expenditure reports filed with the Secretary of State as those reports pertain to itemized expenditures made by the lobbyist. An affirmation is required for any lobbying entity with whom the lobbyist is or was registered as an exclusive lobbyist during the semi-annual period.

Affirmations will pertain to any of the semi-monthly expenditure reports or amendments filed by an employing lobbying entity during the periods of January 1 through June 30, and July 1 through December 31. Notification of impending filing periods will be e-mailed to each lobbyist and each entity’s Authorized Agent. Lobbyists have 30 days from the date of the notice to file their affirmation(s).

It is critical to this process that Authorized Agents perform two important tasks in order to provide their lobbyists with the ability to file an accurate Affirmation:

• All semi-monthly expenditure reports must be filed.
• All lobbyists’ e-mail addresses are current in the entity’s registration file.

Lobbyists may review expenditure reports filed by his or her entity at www.cyberdriveillinois.com:

• Select Lobbyist Activities.
• Select Lobbyist Information Search.
• Select Enter Lobbying Information Search.
• Select Expenditure Report Search and click Submit.

At the Expenditure Report Search screen:

• Select the registration year; type the employer/entity name and click Submit.
• Select and click on the Entity Name.
• Select View Expenditure for each semi-monthly report within the semi-annual affirmation period.

At this point lobbyists will compare his or her personal expenditure records with those reported to the Secretary of State by the Authorized Agent of the employer/entity. If the lobbyist’s personal records of expenditures and the expenditure reports match, the lobbyist is then ready to file his or her affirmation.

If the comparison of the lobbyist’s records and the employer’s expenditure reports indicate errors or omissions of expenditure information, the lobbyist must reconcile the error or omission with the Authorized Agent of the employer entity. Once reconciled, the Authorized Agent must amend the appropriate report, after which the lobbyist may file the Affirmation.

If the lobbyist needs additional time to acquire receipts, credit or debit card records or other expenditure information in order to file the Affirmation, a request for a filing extension must be made in writing to the Index Department at least two business days prior to the deadline for filing the Affirmation. The request for extension may be mailed to the Lobbyist Division, Index Department, 111 E. Monroe St., Springfield, IL 62756; or faxed to 217-557-8919; or e-mailed to elobbyist@ilsos.net. A request for an extension must include the name of the lobbyist and the employer/entity and a detailed reason for the need of an extension. Lobbyists receiving extensions will have the deadline extended by 45 days.

Lobbyists may access the Affirmation statement online at www.cyberdriveillinois.com:

• Select Lobbyist Activities.
• Select Mandated Filings for Exclusive Lobbyists.
• Enter your PIN ID and Entity ID in appropriate fields.
• Proceed with submitting Affirmation statement.
ELECTRONIC EXPENDITURE FILING INSTRUCTIONS

To file an Expenditure Report for a registered entity, visit the Secretary of State’s Web site at www.cyberdriveillinois.com:

- Select Lobbyist Activities.
- On the next page, select Lobbyist Registration and Reporting System.
- On the next page, review information presented and/or select Lobbyist Registration & Reporting System.
- At Login page, enter the Authorized Agent’s User Name and Password.

Access to the expenditure filing system will be opened on the first day of each reporting period. The deadline is 11:59 p.m. on the last day of the filing period. There is no extension of a filing deadline when holidays or weekends are part of the filing period. The system is programmed to retain expenditure information as it is being entered during the filing period. Your file can serve as a data repository until all entries for the reporting period are completed and the Authorized Agent clicks Submit Expenditures to file the report.

Entering and storing information in the expenditure system does not constitute a filing. The actual filing procedure must be executed by the required deadline or late fees will be assessed.

Updating registration files prior to filing the Expenditure Report is important. It is a requirement that the registration file be amended, if necessary, by adding or terminating exclusive lobbyists or clients whose status has changed since the last report. Such updates will automatically populate required fields in the Expenditure Report and make filing expenditures more convenient.

NEW!!! Reporting Multiple Officials for Identical Expenditures

Often, multiple state officials are the beneficiaries of the same or identical expenditures. This type of expenditure most frequently occurs when multiple officials are at the same dinner or event with a lobbyist and the expenditure is prorated equally. Example: A lobbyist and 5 legislators have a dinner. The bill total for the meal is $120.60. The bill is divided equally by 6, the number of attendees, resulting in an individual expenditure amount of $20.10.

In the past, each of the five legislators would be reported separately using an Itemized Expenditure Schedule, and the Authorized Agent would be required to enter the expenditure data five times. Now, the expenditure data may be entered once, after which the 5 legislators’ information may be entered.
Helpful Tips for Preparing to File

• Update the registration file for names of clients, contractual lobbyists and exclusive lobbyists who have been added or deleted since the previous report.
• Update the registration file for changes in e-mail addresses.

Have available the following information for expenditure reporting:

**Itemized Expenditures:**

• Date of Expenditure;
• Amount of Expenditure;
• Category of Expenditure;
  o Gifts
  o Gifts Based on Personal Friendship
  o Honoraria
  o Meals, Beverages and Entertainment
  o Travel and Lodging
  o Other: Any item or service of value that is not of the categories above
• Name and job title of official on whose behalf the expenditure is made;
• Official's employer;
• Name of lobbyist present;
• Type of lobbying – Executive, Legislative or Administrative;
• Subject matter of the lobbying;
  o HB123, SB789, HR456, etc.
  o Categorical Subject, or
  o Goodwill
• Description of the expenditure;
• Purveyor or vendor of expenditure;
• Address or location of expenditure;
• Name of client that benefitted from the expenditure.

**Large Gatherings:**

• Date of expenditure;
• Total amount of expenditure;
• Estimated number of attendees;
• Estimated number of officials attending;
• Brief description of the event (150 characters).

**Giveaways:**

• Date of the expenditure;
• Total amount of the expenditure;
• Estimated number of officials receiving the item;
• Brief description of the item(s) given to officials (150 characters).

**Grass Roots Expenditures:**

• Date & amount of expenditure;
• Category of expenditure;
• Name of official who is recipient of the expenditure;
• Name, address and phone number of person making the grass roots expenditure.
To login to the Illinois Lobbyist System:

- Enter User Name,
- Enter Password,
- Click Login.

If you have forgotten your User Name and Password click **Forgot your User Name or Password?** Enter the e-mail address registered for the Authorized Agent. The information will be returned only to the registered e-mail address of the Authorized Agent.

If during the expenditure reporting process a period of inactivity by the user occurs, the system will automatically timeout and close.

**Once logged in it is important to click the Logout link rather than clicking the X to close the browser. Improper logout will result in the system being unavailable for a period of time; therefore, a delay will occur if you choose to re-enter the system immediately.**
To select the entity for which an expenditure report needs to be filed:

- Click radio button beside desired **Company Name**,  
- Select **Year***,  
- Click **Continue**.

*Be sure to select the correct year for the expenditure filing.*
Authorized Agent Menu

All expenditure filings are accessed through this menu, including Original and Amended reports.

- Click *Expenditures*. 
Select Expenditure

Enter expenditure reports by clicking on the Create button. If expenditure records have been entered but not yet submitted, the button will appear as Continue. Once expenditure records have been submitted, the button will appear as Amend.
Expenditure Reporting Menu

If there were no reportable expenditures made during the reporting period click Continue and proceed to page 25.

If there are expenditures to report, click Add next to expenditure type that should be reported. If you need to amend previously entered records, click Modify next to expenditure type to be amended. Proceed to pages 14-23 for specific Expenditure Schedule instructions.
See instructions on next page.
Itemized Schedule Instructions

This schedule is used for reporting any single expenditure made on behalf of an Official. The following information must be provided for each expenditure record:

- Enter Expenditure Date and Amount,
- Select Expenditure Category,
- Select the Name of the Lobbyist who made the expenditure,
- Select type(s) of lobbying action,
- Enter Subject Matter,
- Enter Description of Expenditure,
- Enter Vendor Name,
- Enter Vendor Address or Location (e.g., Capitol Bldg., Soldier Field, Rend Lake State Park),
- Enter Vendor City and State,
- Select Official's Employer,
  (Follow all steps through the Agency, Title, and Name of Official)
- Click Add Official, (If multiple officials equally benefit from the same expenditure continue to enter the information for the additional official(s) then click Add Official after each entry)
- Click Save and Continue.
Use this screen to indicate all clients who were beneficiaries of the itemized expenditure.

- Click radio button beside the Entity ID of each client,
- Click Save.

If your entity does not list any clients, only your registered entity’s name is available to be selected as a beneficiary.
Itemized Records View Screen

Review each entered record.

- If record information needs to be changed, click *Edit*.
- If record needs to be removed, click *Delete*.
- If an additional expenditure record must be reported, click *Add*.
- If all itemized expenditure records are complete, click *Return to Reporting Menu* to add additional types of expenditure records and/or proceed to Expenditure Summary Report.
This schedule is used when expenditures are incurred for hosting a reception or benefit to which 25 or more Officials are invited.

- Enter Expenditure Date of the event,
- Enter Total Expenditure Amount,
- Enter Estimated number of attendees,
- Enter Estimated number of officials attending,
- Enter brief Description of the gathering,
- Click Save.
Review each entered record.

- If record information needs to be changed, click *Edit*.
- If record needs to be removed, click *Delete*.
- If an additional expenditure record must be reported, click *Add*.
- If all Large Gatherings expenditure records are complete, click *Return to Reporting Menu* to add additional types of expenditure records and/or proceed to Expenditure Summary Report.
Giveaways Schedule

This schedule is used when expenditures are incurred for generic gifts, product samples or substantially identical items given to 25 or more officials.

- Enter Expenditure Date,
- Enter Total Expenditure Amount,
- Enter Estimated number of officials receiving Giveaway,
- Enter brief Description of the giveaway,
- Click Save.
Giveaways View Screen

Review each entered record.

- If record information needs to be changed, click **Edit**.
- If record needs to be removed, click **Delete**.
- If an additional expenditure record must be reported, click **Add**.
- If all Giveaway expenditure records are complete, click **Return to Reporting Menu** to add additional types of expenditure records and/or proceed to Expenditure Summary Report.
Grass Roots Lobbying Statement

Use this statement to report an expenditure made by an individual as a result of a Grass Roots communication or event sponsored by the registered entity. *These statements allow member organizations or individual members to make and report expenditure(s) through the registered umbrella organization without having to register themselves as lobbyists.*

The following information must be provided for each expenditure record:

- Enter Expenditure Date and Amount,
- Select Expenditure Category,
- Select Official's Employer,
  (Follow all steps through the Agency, Title, and Name of Official).
- Enter Name, Address and Phone Number of Grass Roots Lobbyist who made the expenditure,
- Click Save.
Review each entered record.

- If record information needs to be changed, click *Edit*.
- If record needs to be removed, click *Delete*.
- If an additional expenditure record must be reported, click *Add*.
- If all Grass Roots expenditure records are complete, click *Return to Reporting Menu* to add additional types of expenditure records and/or proceed to Expenditure Summary Report.
After all expenditure records or amendments have been entered on the appropriate schedules, click *Continue*. 
This report summarizes all reported expenditure amounts by category. The totals are automatically calculated based on the amounts entered on any of the expenditure schedules.

Verify the amount. If changes are necessary, click Return to Reporting Menu to access the schedules to be corrected. If all records are complete and the amounts are correct, click Submit Expenditures.


An expenditure report is not considered filed until the Submit Expenditures button has been clicked and the information is sent to the system.
Print this screen, as it is your receipt of the filed report. The Index Department is unable to reproduce this screen again for the Authorized Agent.

In addition, click **Printable version of your Expenditure Filings:** [Expenditure Filings](#) to obtain copies of all filed expenditure reports and schedules. **This is the only opportunity available to print these reports.**

The reports will print in the following order:

- Expenditure Summary Report,
- Itemized Schedule,
- Large Gatherings Schedule,
- Giveaways Schedule, and
- Grass Roots Lobbying Statement.

To complete additional transactions for this entity or for other entities, click **Return to Authorized Agent’s Entity List.**

If transactions are complete, click **Logout** in the upper-right corner.
LISTING OF OFFICIALS REQUIRED TO REPORT

The following is a list of positions and position titles deemed to be “Officials” for reporting purposes under The Lobbyist Registration Act (25 ILCS 170).

MEMBERS OF THE GENERAL ASSEMBLY

CONSTITUTIONAL OFFICERS
- Governor
- Lieutenant Governor
- Attorney General
- Secretary of State
- Comptroller
- Treasurer

ATTORNEY GENERAL’S OFFICE
- Chief Deputy Attorney General
- Chief of Staff
- Counsel to the Attorney General
- Deputy Attorney General/Child Support Enforcement
- Deputy Attorney General/Civil Litigation
- Deputy Attorney General/Criminal Justice
- Deputy Attorney General/Springfield & Regional Coordination
- Deputy Chief of Staff/Administration
- Deputy Chief of Staff/Policy & Legislative Affairs
- Senior Counsel to the Attorney General
- Solicitor General

COMPTROLLER’S OFFICE
- Assistant Comptroller – Fiscal Policy
- Assistant Comptroller – Operations
- Assistant Comptroller – Policy & Planning
- Chief of Staff
- Deputy Director of Legal Affairs
- Director of Administrative Services & Budget
- Director of Cemetery Care & Burial Trusts
- Director of Communications
- Director of Financial Reporting
- Director of Human Resources
- Director of Information Technology
- Director of Internal Audits
- Director of Issues Development
- Director of Legal Affairs
- Director of Legislative Affairs
- Director of Local Government
- Director of Research & Fiscal Information
- Director of State Accounting
- Legislative Liaison
- Press Secretary
- Purchasing Agent

LIEUTENANT GOVERNOR’S OFFICE
- Chief of Staff
- Deputy Chief of Staff - Communications
- Deputy Chief of Staff - External Affairs
- Deputy Chief of Staff - Legislative Affairs
- Deputy Chief of Staff - Policy
- General Counsel

SECRETARY OF STATE’S OFFICE
- Chief Auditor
- Deputy Chief Auditor
- Deputy Chief of Staff
- Deputy Director of Intergovernmental Affairs
- Deputy Secretary of State/Chief of Staff
- Director of Intergovernmental Affairs
- Director of Policy and Programs
- General Counsel
- Inspector General
- Press Secretary

Directors, Chief Deputy Directors and Deputy Directors of the following departments:
- Accounting Revenue
- Administrative Hearings
- Archives
- Budget and Fiscal Management
- Business Services
- Communications
- Court of Claims
- Driver Services
- Index
- Information Technology
- Legislative Affairs
- Library
- Personnel
- Physical Services
- Police
- Securities
- Vehicle Services

TREASURER’S OFFICE
- Chief Internal Auditor
- Chief of Staff
- Chief Procurement Officer
- Deputy Chief of Staff for Administration
- Deputy Chief of Staff for Programs
- Deputy Director of Legislative Affairs
- Deputy Press Secretary
- Deputy Treasurer/Chief Fiscal Officer
- Director of College Savings
- Director of Communications
- Director of Community Affairs
- Director of Financial Education
- Director of Human Resources
- Director of Illinois Funds
- Director of Information Technology
- Director of Invest in Illinois
- Director of Legislative Affairs
- Director of Marketing
- Director of Scheduling and Advance
- Director of Technical and Support Services
- Director of Unclaimed Property
- General Counsel
- Manager of Accounting
- Manager of Banking
- Manager of Warrant
- Portfolio Manager
- Press Secretary
GOVERNOR'S OFFICE

Chief of Staff
Deputy Chief of Staff - Economy & Labor
Deputy Chief of Staff - Education
Deputy Chief of Staff - Intergovernmental Affairs
Deputy Chief of Staff - Legislative Affairs
Deputy Chief of Staff - Operations
Deputy Chief of Staff - Public Safety
Deputy Chief of Staff - Social Services
Deputy Governor
Director of Communications
Director of Office of Management & Budget
Director of Policy Development
General Counsel

CODE DEPARTMENTS:
Directors, Assistant Directors and General Counsel of the following agencies:
Aging
Agriculture
Central Management Services
Children and Family Services
Commerce and Economic Opportunity
Corrections
Employment Security
Financial and Professional Regulation
Healthcare and Family Services
Human Rights
Human Services **
Illinois Power Agency
Insurance
Juvenile Justice
Labor
Natural Resources
Public Health
Revenue
State Police
Transportation **
Veterans Affairs

** Secretary, Assistant Secretary and General Counsel of these agencies.

NON-CODE DEPARTMENTS:
Directors, Assistant Directors and General Counsel of the following agencies:
Emergency Management Agency
Environmental Protection Agency
State Fire Marshal
Historic Preservation Agency
Military Affairs ***

*** Adjutant General, Assistant General and Judge Advocate General of this agency.

BOARDS, COMMISSIONS, TASK FORCES AND AUTHORITIES:
Members, Executive Directors and General Counsel of the following:
Boiler and Pressure Vessel Rules Board
Capital Development Board
Carnival-Amusement Safety Board
Charitable Trust Stabilization Committee
Chicago Transit Authority Board
Civil Service Commission
Commerce Commission
Comprehensive Health Insurance Board
Conservation Foundation
Court of Claims
Credit Union Advisors Board
Currency Exchange Advisors Board
Downstate Illinois Sports Facilities Authority Board
Education Labor Relations Board
Environmental Health Practitioners Board
Executive Ethics Commission
Gaming Board
General Assembly Retirement System, Board of Trustees
Health Facilities and Services Review Board
Higher Education, Board of
Historic Preservation Agency, Board of Trustees
Hospital Licensing Board
Human Rights Commission
Illinois Arts Council
Illinois Finance Authority
Illinois Global Partnership, Inc., Board of Directors
Illinois Housing Development Authority
Illinois Juvenile Justice Commission
Illinois Math and Science Academy, Board of Trustees
Illinois Medical District Commission
Illinois Public Safety Agency Network, Inc., Board of Directors
Illinois State Board of Investment
Illinois State Toll Highway Authority
Illinois Student Assistance Commission
Illinois Workers Compensation Commission
Joint Committee on Administrative Rules
Judges’ Retirement System, Board of Trustees
Labor Relations Boards, State and Local
Liquor Control Commission
Local Records Commission
Lottery Control Board
Merit Commission for the Office of the Comptroller
Merit Commission for the Secretary of State
Metropolitan Pier and Exposition Authority
Motor Vehicle Review Board
Personnel Review Board for the Treasurer
Pollution Control Board
Prisoner Review Board
Property Tax Appeal Board
Purchased Care Review Board
Racing Board
Savings Institutions Board
Small Business Utility Advocate
Sports Facilities Authority Board
State Board of Education
State Board of Elections
State Employees’ Retirement System, Board of Trustees
State Mining Board
State Police Merit Board
State Universities Retirement System, Board of Trustees
Teachers’ Retirement System, Board of Trustees
Workforce Investment Board
FOR MORE INFORMATION

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